

Framework for Stakeholder Involvement in Managed Long-Term Care Expansion

Stakeholder involvement is a building block for expansion of managed long-term care in Wisconsin. This document is intended to assist groups that are planning for expansion to understand this expectation and conduct their planning and implementation activities accordingly. Questions or comments about this communication may be addressed to Kathleen Luedtke, Comprehensive Systems Change Manager, at 608-267-4896 or emailed to luedtka@dhfs.state.wi.us

At a minimum, the term *stakeholder* encompasses consumers, their families and informal supports, service providers and their employees, care managers, program administrators, county and tribal agencies and their employees, county and tribal governments, private non-profit and for-profit social services agencies, health care providers, and disability and elder rights advocates. Any person or entity whose present or future care, support, livelihood, interests or mission may be affected by the initiative is a stakeholder.

Current requirements for stakeholder involvement in administration of Family Care that are found in statute, code and contracts with care management organizations may be revised to accommodate the administrative and service delivery models that arise from planning efforts. Planning groups should review these requirements¹ and consider them as minimum expectations as they plan for care management administration.

Identify Stakeholders

Identify and seek the input of all stakeholders, not just those from whom you anticipate comment on your planning activities. Include groups whose interest may not be immediate, but who may be affected in the future. Include groups whose interest in long-term care may have been strong in the past and who may contribute in the form of lessons learned. Make certain that your planning partners understand the diversity of your stakeholders and that their efforts affect all of these people. Recognize diversity among stakeholders by recruiting stakeholder participation broadly from the community and the target populations you anticipate serving. You may find it more effective to identify and communicate with individuals or organizations that represent large numbers of similarly affected stakeholders.

Educate Stakeholders

Active participation in planning requires well-informed stakeholders. *Regardless of their level of participation, stakeholders must have the opportunity to understand the reasons for the initiative and the jargon used in the planning environment.* This education may vary in form from group educational or informational sessions to focused discussions with individuals. The burden for this education falls on planning groups, but you may find it effective to involve elder and disability rights organizations to coordinate and facilitate this education. Lack of information among participants interferes with planning meetings. Structure educational sessions to achieve a baseline of knowledge and “level the playing field” among planning participants. Promote involvement of stakeholders who seek leadership roles in your planning by providing leadership training or technical assistance. DHFS has engaged the UW-Extension to work with planning groups who are interested in assistance to develop stakeholder

¹ See Wis. States. Ch. 46.282; sec. HFS 10.42; and Ch. 1, sec. A. and B., Health and Community Supports Contract, Jan. 1, 2006-December 31, 2006.

leadership and involvement, strategic planning, and development of local educational resources for stakeholders and governing bodies. Contact Patricia Malone at 715-538-2311, ext. 211 to discuss this opportunity.

Promote Stakeholder Participation

Your efforts to promote stakeholder participation should be encompassed within a written plan. Consider including stakeholders among your active planning partners and designate a contact for stakeholders who are not actively involved in your planning process. Stakeholders will have their expectations met if you are clear about their roles and how you will use their input. Strategies for stakeholder participation can include:

- Facilitating the involvement of stakeholders by providing or financing transportation to planning or informational sessions, holding planning meetings in accessible locations, accommodating requests for interpreters, translators and materials in Braille or electronic forms of media.
- Making meeting notices, agendas and minutes available to the public. Providing seating and writing space for stakeholders who wish to observe your meetings. Posting ground rules for public input during meetings and allotting time at every meeting for public input.
- Creating opportunities for public input in the form of town hall meetings, focus groups and public hearings.
- Establishing a stakeholder workgroup and charging that workgroup with disseminating information and facilitating input by others.
- Sustaining stakeholder involvement by recognizing it during planning meetings and according it the same importance as any other input, questions or requests. Being prepared to hear what stakeholders and consumers say and respecting the passion they bring to their participation.

Make Stakeholder Participation Meaningful

Whether their involvement is as decision makers or advisory, only, the involvement of stakeholders in local planning and implementation processes must be meaningful. Often, successful stakeholder involvement is mentored – a more knowledgeable, experienced stakeholder or advocate directly guides a less experienced stakeholder through the bureaucratic aspects of meetings so that his or her input is heard as soon as possible. Consider mentoring any stakeholders who participate in your planning council or workgroups. *The standard for meaningful participation will be met when well-informed stakeholders become knowledgeable observers, critics of your efforts and, eventually, positive agents of change.* Stakeholder criticism of your efforts is an opportunity to draw diverse opinions and interests into your planning process. Meaningful participation has been achieved when stakeholders tell you that they understand the initiative, are able to enumerate their opportunities to affect your planning, feel they can express their concerns and have a voice in your planning.

Make Planning and Implementation Transparent

Stakeholders can understand and affect your planning only if it is visible to them. Carry out your planning activities in the public arena. Allow interested stakeholders access to your administrative and financial activities and decision making in a structured and routinized manner so that both the information needs of stakeholders and the workplan milestones of your planning partners can be met. *Transparency of planning and administrative operations on a day-to-day basis promotes open communication when challenging planning events present themselves.*